# Visitor Economy and Transport in the North of England

## Executive Summary

Transport for the North

July 2021

# 1. Introduction

Transport for the North (TfN) commissioned Atkins and Leisure Consultancy Ltd to undertake research to identify the importance of the visitor economy across the North of England, to identify the role of transport in supporting the visitor economy across the North, and to identify recommendations for transport-related interventions to support the sustainable recovery and future growth of the North's visitor economy. As part of this commission, TfN established a Visitor Economy Steering Group, comprised of representatives of the North's Local Authorities, Transport Bodies, Destination Management Organisations and National Parks, to support and oversee the delivery of the commission. The research supports the continued development of the Northern Powerhouse Independent Economic Review evidence base, and the next iteration of TfN's Strategic Transport Plan, both of which outline the potential for transformational economic growth across the North of England supported by targeted transport interventions, connecting people to economic and leisure opportunities.

# 2. Importance of the North's Visitor Economy

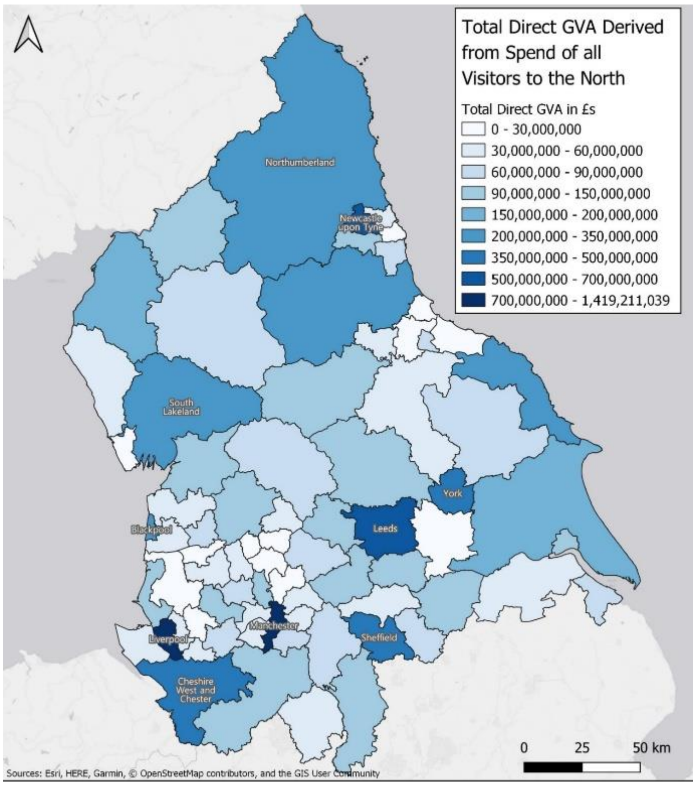
*The visitor economy encompasses both the direct and indirect contributions to the economy resulting from a visitor travelling outside their usual environment for holiday, leisure and events such as concerts and sports, retail, festivals, business such as conferences and exhibitions, education, and visiting friends and relatives.*

The North is rich with a large array of natural, historical, cultural and leisure assets, which helped the region to attract 420 million visits in 2019. People visit the North for a variety of purposes, including day trips, nights out, longer holidays, business trips and events, outdoor activities, or visiting friends and relatives. The North's coastal, rural and urban destinations all play an important role in attracting visitors to the region and enhance the quality of life for residents through the provision of varied leisure opportunities.

April and August are the most popular months to visit the North amongst both domestic and international visitors. Manchester is the most visited destination, while other key destinations also include Leeds, Liverpool, and York. The local authorities of Blackpool, Cheshire West and Chester, County Durham, Northumberland, and Scarborough, also receive significant volumes of visitors.

The popularity of the region amongst visitors has led to the growth of a vibrant and varied visitor economy, comprising of approximately 39,000 businesses employing approximately 579,000 people in 2019, while also supporting additional businesses and jobs through the supply chain. The largest numbers of visitor-related businesses and employment are found in the North's core cities, which also receive the largest numbers of visitors. However, within the North the local authorities of Scarborough, South Lakeland, and Blackpool have the highest shares of visitor related businesses as a proportion of their overall business base, while South Lakeland, Eden, and Staffordshire Moorlands have the highest shares of visitor economy related employment. For these areas, the visitor economy comprises a larger than average share of economic activity and employment, making the sector especially important to local economic vitality.

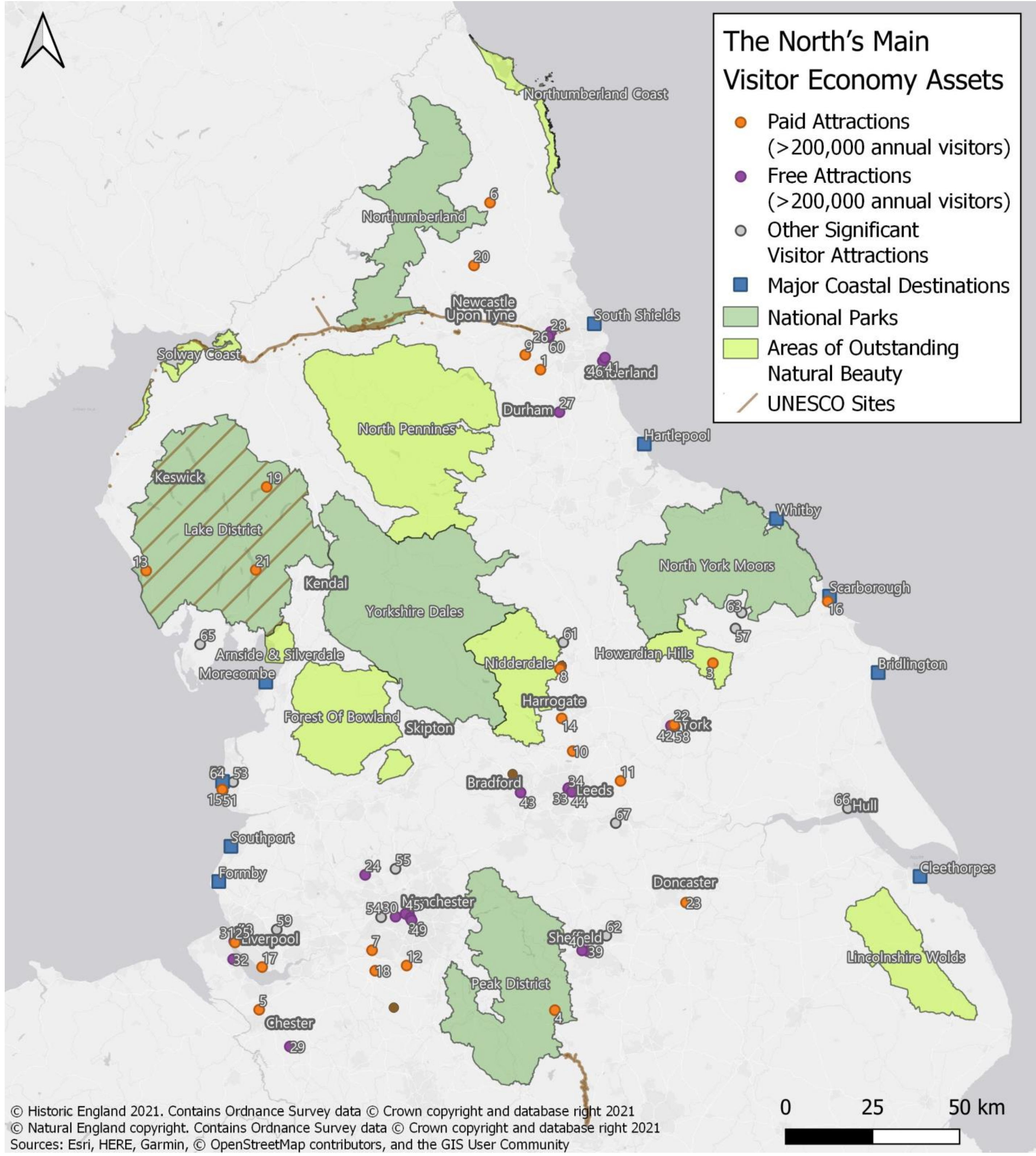
Visitors to the North spent approximately £21.05 billion in 2019. Within the North, this research has identified Manchester, Leeds, Liverpool, York, South Lakeland, and Newcastle as particular hotspots for visitor spend,




*Source: Visit Britain, GBTS Domestic overnight and day tourism by residents of Great Britain, 2019*
*Source: Visit Britain, IPS inbound (international) overnight and day tourism, 2019*

Visitors to the North spent **£21.05 Billion** in 2019

The Total Net GVA impact of the Visitor Economy in the North is **£12.33 Billion** (2019).




*Source: Visit Britain Annual Survey of Visits to Visitor Attractions, 2019; additional attractions identified by desktop research and stakeholder feedback*

At the time of this study (January – July 2021), Liverpool – Maritime Mercantile City remained designated as a UNESCO World Heritage Site

| ***Paid attractions (>200,000 visitors per year)*** | | ***Free attractions (>200,000 visitors per year)*** | | ***Other significant attractions, without published attendance figures*** | |
|---|---|---|---|---|---|
| 1 | Beamish - The Living Museum of the North | 24 | Bolton Museum, Aquarium and Archive | 47 | Tate Liverpool |
| 2 | The Beatles Story | 25 | Customs and Excise National Museum | 48 | Walker Art Gallery |
| 3 | Castle Howard | 26 | Discovery Museum | 49 | Whitworth Art Gallery |
| 4 | Chatsworth | 27 | Durham Cathedral | 50 | World Museum Liverpool |
| 5 | Chester Zoo | 28 | Great North Museum: Hancock | 51 | Blackpool Pleasure Beach |
| 6 | Cragside House, Gardens and Estate | 29 | The Ice Cream Farm | 52 | Blackpool Tower |
| 7 | Dunham Massey Hall | 30 | Imperial War Museum North | 53 | Blackpool Zoo |
| 8 | Fountains Abbey | 31 | International Slavery Museum | 54 | Chill Factore |
| 9 | Gibside | 32 | Lady Lever Art Gallery | 55 | East Lancs Railway |
| 10 | Harewood House Trust | 33 | Leeds Art Gallery | 56 | Fantasy Island |
| 11 | Lotherton Hall & Gardens | 34 | Leeds City Museum | 57 | Flamingo Land |
| 12 | Quarry Bank Mill and Garden | 35 | Manchester Art Gallery | 58 | JORVIK Viking Centre |
| 13 | Ravenglass & Eskdale Railway Co Ltd | 36 | Manchester Museum | 59 | Knowsley Safari Park |
| 14 | RHS Garden Harlow Carr | 37 | Merseyside Maritime Museum | 60 | Life Science Centre |
| 15 | Sandcastle Waterpark | 38 | Museum of Liverpool | 61 | Lightwater Valley Theme Park |
| 16 | Scarborough Cliff Railway | 39 | Museums Sheffield: Millennium Gallery | 62 | Magna Science Adventure Centre |
| 17 | Speke Hall, Gardens & Estate | 40 | Museums Sheffield: Weston Park | 63 | North Yorkshire Moors Railway |
| 18 | Tatton Park | 41 | National Glass Center | 64 | SEA LIFE Blackpool |
| 19 | Ullswater Steamers | 42 | National Railway Museum | 65 | South Lakes Safari Zoo |
| 20 | Wallington House, Gardens & Estate | 43 | National Science and Media Museum | 66 | The Deep |
| 21 | Windermere Lake Cruises, Bowness | 44 | Royal Armories Museum | 67 | Xscape |
| 22 | York Minister | 45 | Science and Industry Museum | | |
| 23 | Yorkshire Wildlife Park | 46 | Sunderland Museum and Winter Gardens | | |

# 3. Transport and the Visitor Economy

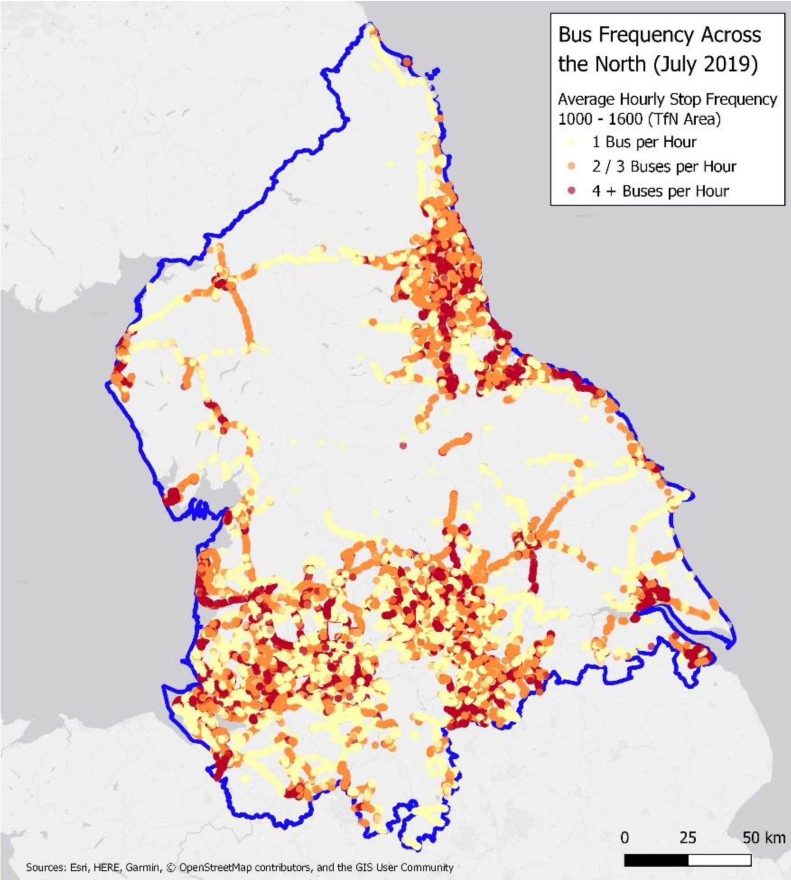
Despite recent trends towards increased digital communication and remote working during the Covid-19 pandemic, face-to-face interaction and experiences remain an important aspect of leisure time for many. While demand for commuter travel has remained low since the start of the pandemic, domestic leisure travel has recovered much faster, as people look to socialise and explore following prolonged periods of lockdown restrictions. While these new patterns of transport demand are challenging the historical links between transport and the labour market, with a move away from daily commuting patterns likely for many industries, the relationship between transport and the visitor economy remains as strong as ever.

| Main Mode | Visitor Journeys to/from the North | Visitor Journeys within the North |
|---|---|---|
| Car / van | 78% | 85% |
| Surface Rail | 17% | 8% |
| Other | 5% | 7% |

Analysis of the National Travel Survey identified that most visitor transport demand in the North of England is generated by people travelling between urban areas, between urban and rural areas, and between urban and coastal areas, mirroring the locations identified as key visitor hotspots. Car is the dominant mode for visitor journeys, especially those within the North. Rail is more likely to be used for visitor journeys from other regions to the North than for visitor journeys within the North. While visiting the North, many shorter journeys are undertaken by walking, particularly in coastal and rural areas. Despite the popularity of walking, visitors to the North were found to make fewer trips by bicycle than average. For longer trips, taxis were found to be more popular than public transport. This evidence suggests the North's public transport services are not fully meeting the needs of visitors to the region. Increased use of public transport and active travel for visitor journeys would put the North's visitor economy on a more sustainable footing.

Among international visitors to the North, three quarters arrive by air directly to the North, with over two thirds of these visitors arriving via Manchester Airport. Visiting friends and relatives was the most common trip purpose amongst international visitors taking a direct trip to the North, while those making an indirect trip were most likely to be travelling for a holiday. Journeys made by international visitors to and from the North's airports follow a markedly different pattern to domestic visitor journeys. Use of private cars is much lower, while taxis record a much larger mode share. Levels of public transport use vary but are generally strongest at those airports directly served by rail or light rail services, or those which provide high quality interchange to and from the rail network at a nearby rail station.

Currently proposed rail interventions, such as Northern Powerhouse Rail and High Speed 2, will bring major accessibility benefits to large parts of the North of England, resulting in significant journey time benefits to journeys between the North's core cities, and other urban areas outside the North. Many outlying parts of the North will continue to rely on connecting rail and bus services to access these new high-speed services. Analysis of bus services across the North has found that low frequencies, sparse services, and limited operational hours constrain public transport access for large parts of the North. Current public transport services therefore do not support many aspects of the visitor economy, particularly the night-time economy.




*Source: National Public Transport Data Repository, 2019*

# 4. Views of visitors to the North of England

In order to understand how the North of England's visitor economy is perceived and experienced, and the extent to which these perceptions are shaped by transport, 9 focus groups with residents of the North and 3 focus groups with residents of other parts of Great Britain were completed as part of this study. The purpose of this research was to capture qualitative insights into the North's visitor economy to help inform the sustainable growth of the sector and its recovery from the Covid-19 pandemic.


Participants in the focus group sessions generally expressed positive sentiment and emotions towards visiting the North of England for either a day trip, weekend break, or longer stay. Day trips or weekend breaks were most favoured amongst residents of the North, as opposed to a longer holiday, where a destination further afield (either in the UK or abroad) would be preferred. Amongst residents of other regions, the North was regarded in a positive light for a weekend or longer break. Day trips to the North from other regions, while not out of the question, were less favoured due to long journey times from some parts of the UK. The majority of participants in the research stated they would prefer a 2-hour maximum journey time for day trips.

| Day trips | Weekend stays |
| --- | --- |
| Participants mainly spoke fondly of day trips to the North, unless living a significant distance from the region. They highlighted the variety of attractions available within a few hours, including coastal areas, National Parks and Areas of Outstanding Natural Beauty, as well as cities and towns. Participants found the ability to spontaneously set off or to book last minute as very attractive. | Participants generally expressed excitement at the thought of a weekend trip to the North, speaking about previous positive experiences of the region exploring the region's cities, coasts, or beauty spots. Visits to cities were commonly spent enjoying the nightlife with friends. Repeat trips to familiar seaside destinations such as Crosby beach (Southport) and Whitby were also hoped for in the near future. |

Many participants expressed an increased willingness to stay local when it comes to leisure trips. In particular, the likelihood for residents of the North to increase leisure visits within the region seems very likely, especially in the short to medium term while restrictions and concerns about the pandemic remain.

Many participants highlighted the North's variety as a key attraction, noting various villages, towns, and cities, coastal areas, National Parks and Areas of Outstanding Natural beauty (AONBs) as key attractors. Each type of place was seen to have a unique offer, meaning the region had something of interest to visitors, regardless of trip preferences. The close proximity of many of the North's key attractions provides visitors with an ability to move between different types of area on consecutive days (e.g. moors on day 1 and seaside on day 2), providing 'added value' both to the North's visitor economy, and the experience of visitors to the region.

> "We would normally drive to a holiday/trip in the North, but anywhere in the South we get the train. Its only 1hr 40 into Euston and we have a family rail card, and we don't have to bother with a slower journey and also the issue with driving in London. The trains are not as convenient or fast in the North – often packed and very slow. If the service was as good for trains going South (fast, less changes) I would be open to using the trains in the North."
>
> *– Jill, 43, Cheshire East, Bollington*
>
> ***Note all residents' names have been changed***

A number of participants raised the issue of public transport not providing adequate services on Sundays, weekends, or evenings, making weekend trips especially difficult. Participants highlighted the infrequency of service at those times, as well as in rural areas more broadly. It was also noted that timetabling for buses can be confusing and overcomplicated, with varying timetables for different days, bank holidays, term time and non-term time all adding to the confusion. When travelling within the North, many participants expressed a preference to travel by car, as the North's public transport services and ticketing arrangements were perceived as not meeting the needs of visitors, particularly families, passengers with mobility or other health issues, and those travelling with bikes or heavy luggage.

Many participants also identified the cost of public transport as a significant barrier preventing them from visiting the North. These comments were often made in relation to travelling as a group on public transport, which contrasted with the perceived lower costs of travelling by car, which reduces as more passengers share the trip. The variety of fare options added to confusion; increases to the price of 'advance' train tickets closer to the day of departure concerned a number of participants, while flexible tickets were perceived as poor value for money in comparison to travelling by car. This finding is particularly important when thinking about modal choice for last minute day trips, which may become increasingly popular in the post-Covid environment, especially while uncertainty surrounding restrictions remains.

"The multilayers of transport use valuable time and it adds to the time and stress of getting home. Your vehicle is ready and has diesel in it".

*– Samira, 48, West Lothian, Livingston*

"Disjointed websites are a big issue. To know where you actually book tickets can be difficult".

*– Jasdeep, 40, West Midlands, Sutton Coldfield*

The preference for using the private car was linked to negative perceptions, and real-world experiences, of using public transport to travel to and within the North. Anxieties around the reliability of services, (that services may be cancelled at the last minute, or may be subject to delays), generally put many participants off making visits to the North via public transport. Participants also identified a lack of through/direct services between key places in the North; while sometimes open to changing trains (generally when travelling alone and without luggage), the majority of participants preferred direct services where possible, and would generally choose to travel directly by car if an alternative public transport journey would involve changes. There were also frustrations for many participants who liked to take cycling breaks that there are currently not enough provisions for bike racks/cycle carriages on trains, and they also highlighted the need for more safe and secure bike storage facilities at stations and transport hubs.

Most participants thought there was limited information about the variety of attractions across the North of England, the transport options available, and tourist specific transport offerings especially (e.g. bundles/tourist tickets), particularly in comparison to other cities and regions, both in the UK and abroad, which have a well marketed integrated ticketing offer, including promotions and specific passes for visitors. While information on the North's key destinations and attractions is available, participants felt it was fragmented over multiple sources. Participants noted that each area tends to market only their 'patch', meaning information on attractions in surrounding areas can be easily missed. Some participants also identified that the North does not have a consistent brand to advertise its visitor offer, identifying the strength of brands such as Visit Wales as exemplars the North could follow.

"Greater publicity for particular attractions is the sort of thing which captures people. There are well known attractions but an actual push, like City of Culture type events that make you think 'ah yes!'".

*– Edmond, 67, Devon, Brixham*

"Lots of adverts from Visit Wales with promotional videos of regions etc. But I don't see anything like this from the North."

*– Yiannis, 50, Cheshire, Chester*

A number of participants expressed anxiety about returning to public transport following the loosening of Covid restrictions, particularly in the short term. They mentioned the idea of mask-wearing for long periods of time being uncomfortable and a negative experience, as well as the worry that other passengers wouldn't socially distance or wear masks. It was noted however, as vaccination rates increase, perceptions of safety would be improved. With participants now used to feeling a greater sense of safety and hygiene in their cars, alongside perceptions of greater flexibility, it is possible that the return to public transport might be slow and difficult for some groups without interventions, incentives, and nudges. Particular emphasis may need to be given to providing alternative options to the car for 'the last mile', or travel around a destination. For example, there was clear interest in using micro-mobility modes at Northern destinations from a significant proportion of focus group participants. Over 40% of participants felt that easily accessible e-scooters or e-bikes at Northern destinations would encourage them to visit destinations in the North. There is therefore an opportunity to increase use of public transport and micro-mobility modes as part of a sustainable integrated visitor journey by improving or providing these facilities in Northern destinations.

# 5. Stakeholder Perceptions and Issues

Stakeholders from the North's destination management organisations (DMOs), leisure and tourism industries, transport operators, local authorities and local enterprise partnerships, were identified and invited to participate in workshop discussions to capture their views and inform the recommendations of this study.

There was consensus across the stakeholder groups that the friendliness and beauty of the North are key assets. The region was regarded as having a strong variety of activities to offer visitors, coupled with many scenic transport routes which could be leveraged to attract visitors to the region, and to encourage public transport post-pandemic. Leveraging existing connectivity to beauty spots was seen as giving visitors a different experience of public transport, where the journey is part of the attraction of the visit, enabling travel via public transport to be re-imagined as an enjoyable and shared experience.

> *"Multi-modal integration – having that network there. The network in Cumbria is very sparse in some areas, especially since funding was cut. We are doing a lot of work to encourage people to travel sustainably, but this is only feasible in some areas"*
>
> *– Gemma Proctor, Cumbria Tourism*

While a number of scenic transport routes running through rural parts of the North have proved successful in recent years (the Settle to Carlisle rail route, and Yorkshire Coastliner bus service were singled out as exemplars), gaining secure funding for new services was identified as a significant challenge by many stakeholders, with concerns being expressed that funding cuts were disproportionately affecting visitor economy hotspots across the North. In order to attract visitors to use public transport as part of their visit, stakeholders felt a dense and reliable network of services and stops was required, something which many rural areas in the North of England do not currently provide. Where funding remained available, stakeholders felt it was too time limited, and therefore did not enable them to establish services as commercially viable prior to the end of the funded period.

> *"With the new and refurbished rolling stock, they have much smaller spaces for bike storage. Rather than a dedicated space, it might coexist with a flip up seat (Pushchair/wheelchair space), making it difficult to get bikes in"*
>
> *– Nick Chamberlain, British Cycling*

Stakeholders identified the North's combination of large areas of open space and established network of public pathways for walking and cycling as a key selling point for the region; there being an important opportunity to take advantage of these assets to facilitate and encourage sustainable active travel across the North for visitors. However, their use among visitors to the region at present was regarded as a challenge on multiple fronts. For example, stakeholders felt cycle hire schemes would be more successful if a high-density network were to be provided. Participants also mentioned that visitors are often more inclined to bring their own bikes if they want to take advantage of cycle routes or pathways, especially if they have specialist or tailored bikes. While there is an option for visitors to use public transport and put their bikes on the train, stakeholders highlighted that much of the new rolling stock introduced across the North has reduced cycle storage space which may deter visitors from using trains and encourage use of private vehicles instead. Stakeholders identified a conflict between current DfT policy for bikes to be available at each end of the rail journey, and the customer preference to take bikes with them on trains, therefore adding a further barrier to the uptake of public transport amongst visitors to the North of England.

> *"To anybody who has ever tried to get across the North of England, the lack of spending on infrastructure in the North compared to what you see in the south is obvious to anybody, bottlenecks where there shouldn't be and lack of routes where there should be."*
>
> *– Robert Nisbet, Rail Delivery Group*

Stakeholders identified that travelling from the South of the UK is relatively simple, with many trains going from London to different areas of the North. However, travel across the North, especially east-west connectivity, was considered to provide a poor experience, with slow journey times relative to those to and from London. There was strong consensus among stakeholders that connectivity within the North should be improved, especially since visitors are likely to move around and not stay in one place when visiting the North. Visitors are currently more likely to use a private vehicle for multi-destination trips, as public transport links are poor for visitors seeking such flexibility. Alongside these challenges, key tourist sites and areas of natural beauty, especially those in rural areas, have poor transport infrastructure and low public transport service frequency, posing barriers to increasing visitor numbers.

Unreliable, infrequent and outdated trains or buses that can deter visitors from using public transport in the North were all mentioned by stakeholders. Just one bad experience can push visitors towards using a private vehicle

*"Slow and outdated trains, my heart sinks when I get the timing wrong and you end up on a very old train on the Manchester to Peak District routes. With visitors, if you're trying to encourage them to change habits and move away from cars, the first impression counts every time and getting them to use it after a bad experience is even harder."*

*– Jo Dilley, Marketing Peak District and Derbyshire*

for future trips. This issue, as well as issues associated with poor timetable integration across different modes, and restricted operational hours for journeys serving both rural areas and airports, will continue to discourage visitors from using public transport according to stakeholders.

Alongside enhanced services, stakeholders also identified the importance of improvements to fares and ticketing. The current system of separate tickets for different modes or operators is often difficult for visitors to navigate; this can intimidate and deter visitors from using public transport, in particular international visitors unfamiliar with the UK and English language. The current ticketing offer in the North is seen as outdated by stakeholders, with a need to digitalise the system, for example by using the London Oyster card as a blueprint. This could then allow for more data collection and analytics on visitors in the region, which could feed into creating a better transport offer within the North. Some stakeholders who participated in the research had managed to launch innovative products within the confines of existing ticketing regulations. However, this was not always straightforward, with stakeholders identifying some operators as more open to co-developing these products than others. Current regulations were also perceived as a barrier to offering products which combine transport with other services such as accommodation or attraction entry.

*"We have got virtual rail stations, e.g. Pickering, where people can buy a through rail ticket to these places including train and bus. Having it all on one ticket breaks down the barriers to making these journeys"*

*– Alex Hornsby, Transdev*

*There's a real barrier that if you sell transport and accommodation, you're automatically deemed to be a tour operator. The person selling it becomes legally liable for anything that happens to the customer even if it happens at the other business. We are trying to change the regulation, devised by the EU and could be one of the benefits of Brexit."*

*– Kurt Janson - Tourism Alliance*

The marketing of a safe return to public transport was identified by stakeholders as being vital to making visitors feel comfortable visiting the North using greener, more sustainable transport options. This marketing would need to be backed up by consistent monitoring of demand, the management of over-crowding, and social distancing measures on board services. Stakeholders also identified the need to develop better links with tourism attractions to facilitate more journeys being undertaken by sustainable modes.

Stakeholders identified the pandemic as an opportunity and catalyst for change, which has been seized by certain parts of the North's visitor economy. However, collaboration between the operators of different transport modes, and between some public sector bodies, was a continuing issue, with stakeholders identifying conflict and misalignment of priorities between different organisations. Some stakeholders identified the potential for TfN to assist with collaboration between stakeholders, and to ensure organisations work together collaboratively, rather than compete for potential visitors. Greater collaboration would also assist with the management of increases in domestic visitor numbers which have occurred as a result of restrictions surrounding international travel. Some stakeholders were concerned about the impact of rising visitor numbers on the sustainability of certain destinations, particularly if visitors continue to use private cars as their primary mode of transport.

*"People are now travelling to harder to reach areas such as Buttermere, however a lot of people are doing this. These areas don't have the infrastructure to cope with the visitor numbers we are seeing, especially parking as public transport use has been discouraged."*

*– Gemma Proctor - Cumbria Tourism*

*"Very supportive of High Speed 2 addressing the needs of the business traveller – i.e. getting there fast – doing business – getting back fast!"*

*– Jane Longhurst, Meetings Industry Association*

As it is predicted that domestic visits to the North will increase due to post-pandemic staycations and demand for leisure, there is more pressure to make sure that the growth in visitors to the North is sustainable. Finding ways to encourage people to use public transport and active travel more will be key to a sustainable growth in visitors. Taking advantage of the changes from lockdown, such as increased cycling and walking, alongside other trends such as increased environmental awareness, will help the North's visitor economy to be more sustainable. Stakeholders identified planned infrastructure investments such as Northern Powerhouse Rail and High Speed 2 as providing a step change in connectivity which will increase the attractiveness of the region, for domestic business and leisure visitors, while also providing better links to key international gateways in other parts of England.

# 6. Recommendations

The recommendations of this study were developed in response to the evidence gathered throughout the study, taking into account the economic and transport profile of the North's visitor economy, and the views and experiences of residents and stakeholders. Each recommendation has been developed with the aim of making transport easier to use, more sustainable and inclusive, and better aligned to the needs of visitors travelling to and within the North of England. As a next step, it is recommended that TfN collaborates with key partners and stakeholders to develop action plans identifying opportunities and actions for implementation, focusing on rail in the first instance.

| Recommendation | Key actions | Geographic application | Implementation timeframe | Suggested delivery partners |
|---|---|---|---|---|
| Increased safety messaging and a communications campaign to support and encourage post-Covid travel on public transport | A unified pan-Northern communications, marketing and incentivisation campaign. This should reassure customers of the safety and efficiency of public transport, remind customers of the benefits of travelling by public transport, and incentivise the use of sustainable travel modes | Pan-Northern | 1-6 month horizon, focusing on key periods of travel demand e.g. School Holidays and seasonal peaks | The North's transport operators and community rail partnerships, supported by TfN |
| | Messaging from senior politicians in support of public transport | Pan-Northern | 1-6 month horizon | TfN, with support from local and central government |
| Provision of better-quality active travel facilities on public transport and at visitor economy hotspots | Improved facilities for active travel on public transport services to support active tourism across the North | Pan-Northern | 1-3 year horizon | The North's LTAs, transport operators, rolling stock leasing companies (ROSCOS), supported by TfN |
| | Improved facilities for active travel at key visitor destinations | Pan-Northern, tailored to local requirements | 1-3 year horizon | The North's LTAs, DMOs, and highway authorities, supported by TfN |
| | Widespread trial of micromobility offerings at suitable visitor destinations to complement active modes | Locally tailored offer at key destinations | 1-3 year horizon | The North's LTAs, DMOs, and highway authorities, supported by TfN |
| Promotion and development of ticket offers and packages | Raise awareness of existing leisure orientated ticket products (e.g. rover tickets, BritRail) through marketing channels and links to visitor attractions served by public transport services | Pan-Northern | 1-6 month horizon | The North's transport operators, destination management organisations (DMOs), and community rail partnerships, supported by TfN |

| Recommendation | Key actions | Geographic application | Implementation timeframe | Suggested delivery partners |
|---|---|---|---|---|
| | Ensure leisure orientated ticketing products can be easily purchased through popular sales channels such as mobile apps and ticket machines | Pan-Northern | 12 month horizon | The North's transport operators and the Rail Delivery Group, supported by TfN |
| | Wider knowledge and availability of ticketing products which combine travel with admission to visitor attractions to facilitate easier and more competitively priced visits to the North | Pan-Northern | 1-3 year horizon | The North's transport operators and DMOs, supported by TfN |
| | Availability of ticketing products which combine travel with accommodation to facilitate easier and more competitively priced visits to the North | Pan-Northern | 3-5+ year horizon | Central Government, supported by TfN, the North's transport operators, and DMOs |
| | Multi-modal ticketing to facilitate frictionless journeys across multiple modes | Pan-Northern | 3-5+ year horizon | Central Government, supported by TfN, the North's transport operators |
| More reliable and joined up services that reduce journey times, changes between services, and uncertainty for visitors | Introduction of seasonal excursions and leisure orientated public transport services to popular destinations, aiming for door-to-door convenience where possible | Key visitor flows within the North | 1-3 year horizon | The North's transport operators, DMOs, and Confederation of Passenger Transport (CPT), supported by TfN |
| | Improve connectivity by providing more through services between visitor hotspots and large centres of population | Pan-Northern | 3-5+ year horizon | The North's transport operators, local transport authorities (LTAs), Network Rail, supported by TfN |
| Facilitate easier visitor journeys to and within the North, via customer-centric information, infrastructure and services | Market public transport as an experience and mode of choice to visitors to the North through the promotion of scenic routes and creation of car free itineraries | Pan-Northern, focusing on popular destinations or flows where public transport use is low | 12 month horizon | The North's transport operators, community rail partnerships, and DMOs, supported by TfN |
| | Provide enhanced signposting of attractions and beauty spots using 'brown tourist signs' and urban wayfinding schemes | Visitor hotspots within the North | 12 month horizon | The North's highways authorities and DMOs |

| Recommendation | Key actions | Geographic application | Implementation timeframe | Suggested delivery partners |
|---|---|---|---|---|
| | Creation of tailored onward mobility hubs at gateways to key leisure destinations | Locally tailored offer at key gateways to the North's visitor hotspots | 3-5 year horizon | The North's LTAs, Network Rail, CPT, transport operators and DMOs, supported by TfN |
| Develop an accessible and inclusive visitor economy | Marketing and communications tailored to the needs and concerns of less able and marginalised groups to directly target barriers to returning to public transport | Pan-Northern | 12 month horizon | The North's transport operators and community rail partnerships, supported by TfN |
| | Enhanced customer service and journey assistance to facilitate door-to-door public transport journeys | Pan-Northern | 1-3 year horizon | The North's transport operators, community rail partnerships, and CPT, supported by TfN |
| | Use of inclusive design principles as part of the development of new transport infrastructure and services | Pan-Northern | 1-3 year horizon | TfN and the North's LTAs and highway authorities |
| | Development of public transport services and fares which respect diverse socio-economic contexts ensuring equality of access to the North | Pan-Northern | 1-3 year horizon | The North's transport operators, local transport authorities, and community rail partnerships, supported by TfN |
| A more joined up approach across the North to better market the region and manage transport demand | Closer coordination between destinations, attractions and transport operators to more actively and effectively manage demand on key transport routes and at key destinations | Pan-Northern | 12 month horizon | The North's DMOs, transport operators, and leisure operators, supported by TfN |
| | Closer collaboration between DMOs to externally market the North with one voice, ensuring visitors can access information on the region from one source, while maintaining the strength and recognition of existing well-known destination brands | Pan-Northern | 1-3 year horizon | The North's DMOs, supported by TfN |
| | Improved data sharing between key organisations to support improved planning and better customer insight | Pan-Northern | 1-3 year horizon | The North's DMOs, transport operators, and leisure operators, supported by TfN |

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